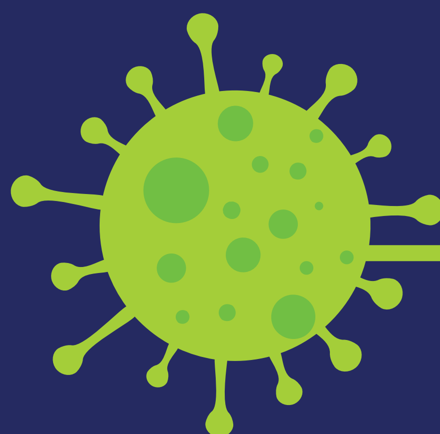
DELAWARE VALLEY SMART GROWTH ALLIANCE

OUR CHANGING ATTITUDES ABOUT
PERSONAL SPACE AND PUBLIC PLACES



SMART GROWTH AFTER COVID-19

SURVEY FINDINGS | MAY 2020

DELAWARE VALLEY SMART GROWTH ALLIANCE

In May of 2020, the **Delaware Valley Smart Growth Alliance** conducted a survey to learn how attitudes about personal space and public places might change in our region due to the COVID-19 virus. This survey, reflecting the opinions of 86 respondents, provides a preliminary indication of how those who live and work in the Delaware Valley are likely to change their use of public places. This survey asked respondents to envision how and where they might spend their time differently one year after an effective vaccine for COVID-19. We hope that this preliminary study will inspire more in-depth investigation to assist communities, businesses, and developers who retrofit and design our built environment to reflect these changing attitudes.

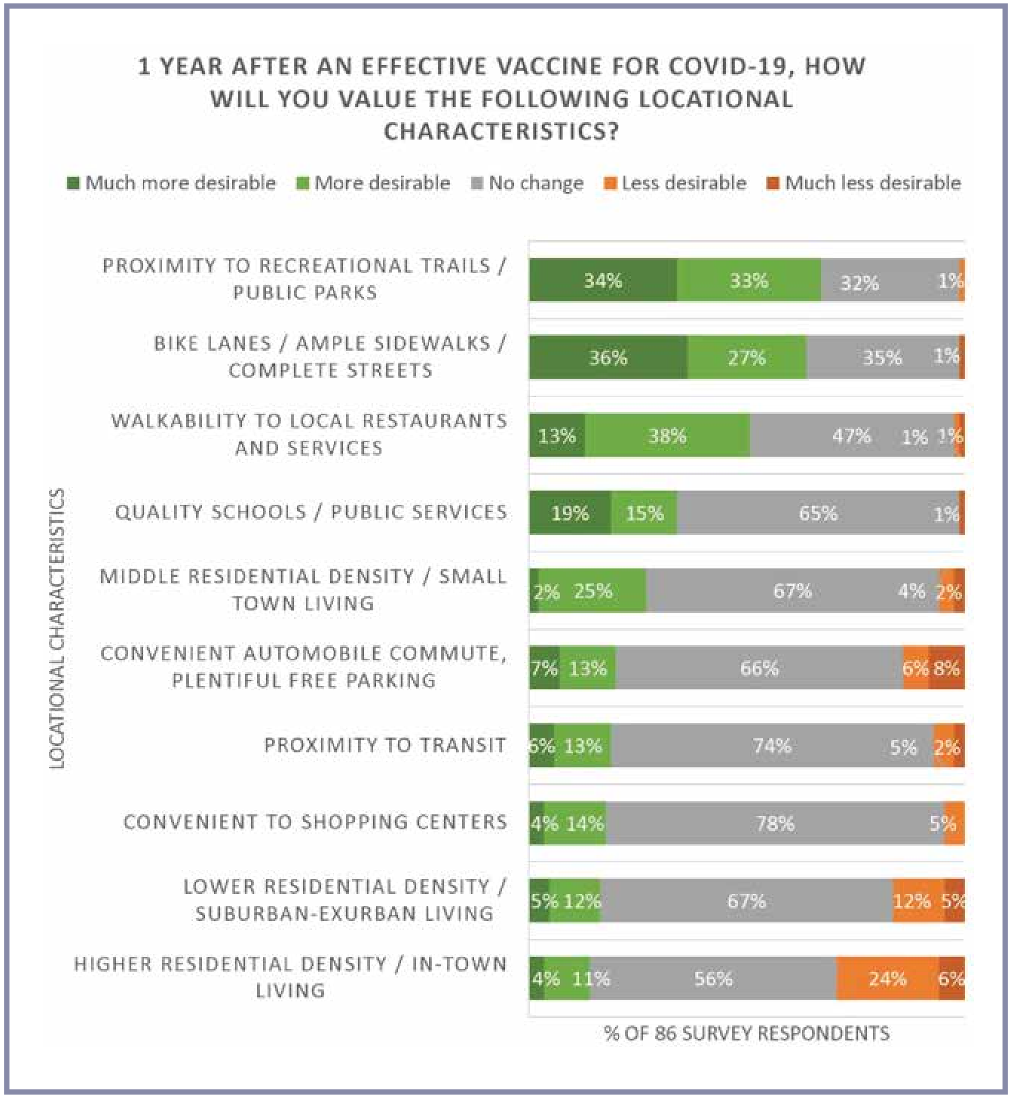
The overarching theme of these survey results is that 89% of respondents expect to have a desire for more personal space. Moreover, this new reality is likely to impact how our region will live, shop, dine, and recreate as well as the modes of transportation we will feel safe choosing. As we examine the many aspects of these changing priorities, we will start by looking at our parks and public spaces.

Parks, sidewalks, and public spaces are becoming more important

As more people work from home and practice social distancing during this pandemic, it appears as though over 90% of respondents plan to do more walking and cycling once an effective vaccine is in place. While 67% place a higher value on being in close proximity to recreational trails and public parks, an equal importance (63%) will be placed on complete streets (those that are designed to share space for pedestrians, bicyclists, cars, and transit), as well as offering generous sidewalks.

The chart to the right highlights the locational characteristics most valued by survey respondents. The most valued community amenities include:

- **Proximity to recreational trails and public parks**
- **Bike lanes, ample sidewalks and complete streets**
- **Walkability to local restaurants and services**



SMART GROWTH AFTER COVID-19: SURVEY FINDINGS

A preference for small town living and online shopping

Middle density neighborhoods may benefit from Covid-19. Our survey respondents perceive that middle density neighborhoods have increased the most in desirability while high-density has fallen the most.

This survey reveals that 30% of residents living in suburban neighborhoods not served by transit and 32% of residents living in urban neighborhoods place a higher value on small town living and middle density residences. For those who live in suburban neighborhoods served by transit, 22% place a higher value on small town living and middle density residences. Of note, survey respondents who live in urban neighborhoods continue to support living "in town" and continue to prefer higher density residences and survey respondents who live in suburban neighborhoods continue to prefer lower density residences.

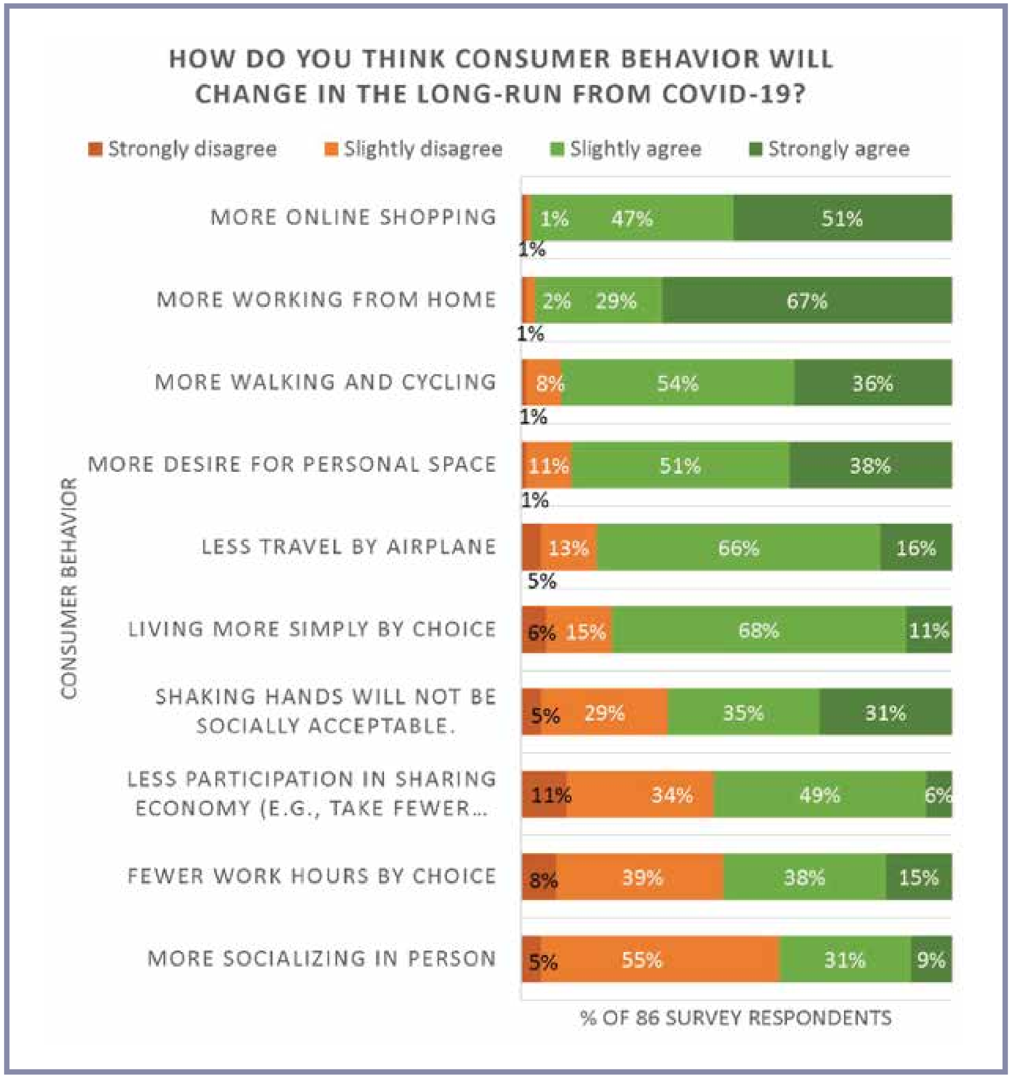
With 98% of respondents expecting to do more online shopping, it is becoming clear that retail shopping preferences are rapidly changing. Although this trend has sustained continued growth over the last ten years, online retailing is now likely to accelerate even faster due to increased demand as well as increased capacity of fulfillment and delivery systems. Not surprisingly, 34% of respondents are less likely to visit a shopping mall. However, 39% of those aged 40 and older are less likely to visit a shopping mall, compared to 26% of respondents who are under the age of 40. This trend of older respondents desiring more personal space is also reflected in respondents' attitudes toward indoor movie theaters and concerts. While 32% are less likely to visit a movie theater or concert, 39% of the respondents aged 40 and over are less likely to visit a movie theater or concert, compared to 19% of respondents who are under the age of 40.

The chart on the next page indicates how our consumer behavior may change in the long run after Covid-19. The most significant changes in consumer behavior are projected to be:

- More online shopping
- More working from home
- More walking and cycling and
- More desire for personal space

Changing preferences for walkable commercial districts and eat-in restaurants

According to survey respondents, 51% will place a higher value on walkability to local restaurants and services. 61% of those who live in urban neighborhoods will place a high value on this walkability to restaurants and services while 41% of residents of suburban neighborhoods share this value. Although this is not an entirely surprising finding, it reinforces the importance of investing in sidewalks and trails to better connect our homes and commercial districts. With increased concerns about personal space, 27% of all respondents are less likely to visit eat-in restaurants. With many local ordinances controlling access to sidewalks, this reinforces the need to rethink our ordinances and redesign our sidewalks and outdoor spaces to better accommodate social distancing, sidewalk retailing, outdoor dining and those with limited mobility.

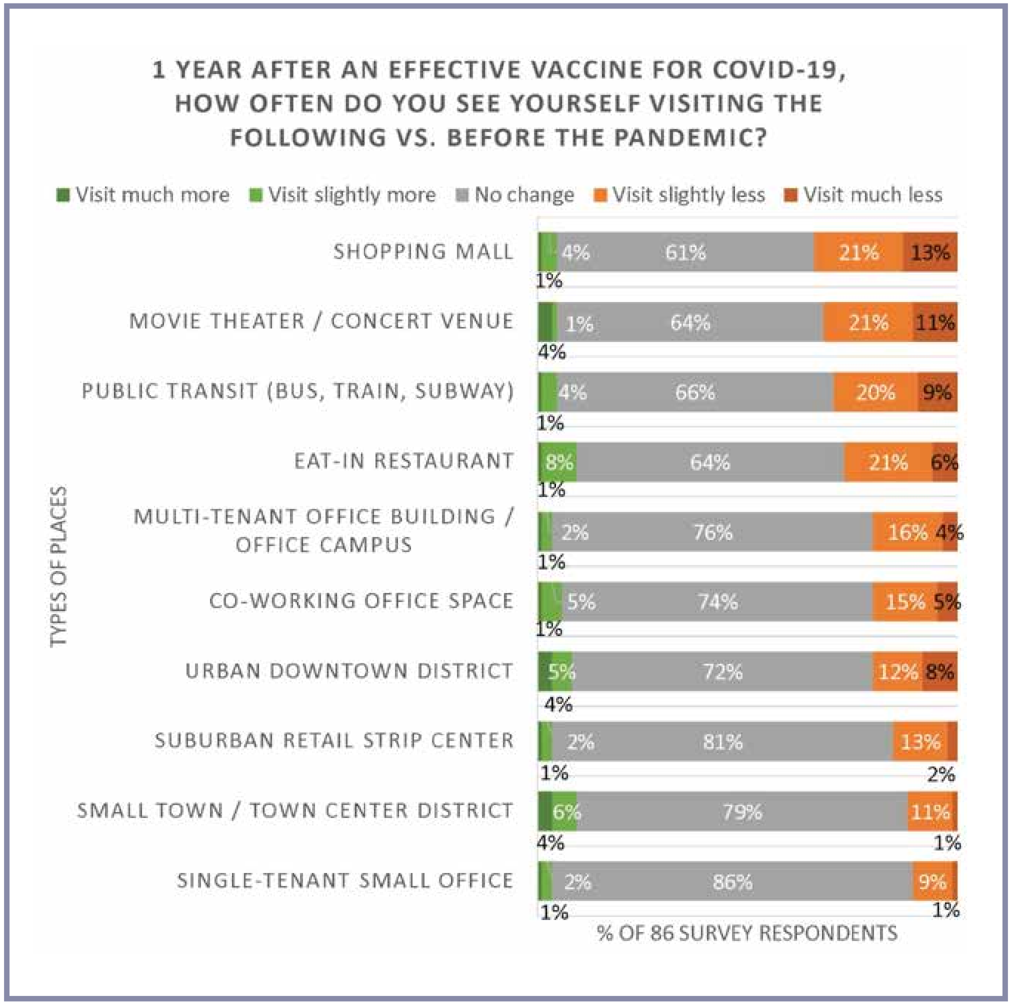


Our changing workplaces and public services

With the many changes afoot in the workplace, 97% of respondents expect to spend more time working from home following an effective COVID-19 vaccine. Although this change is less significant, 33% of respondents will place a higher value on quality schools and public services. Clearly, both topics will require further study to better understand how our homes, schools, and public services should be modified to better accommodate these shifting preferences.

The chart to the right indicates how our region's population anticipates shifting where they spend time. The three places likely to be visited less frequently include:

- Shopping malls
- Movie theaters and concert venues
- Public transit



Many will avoid public transit in favor of walking, cycling, and private automobile use

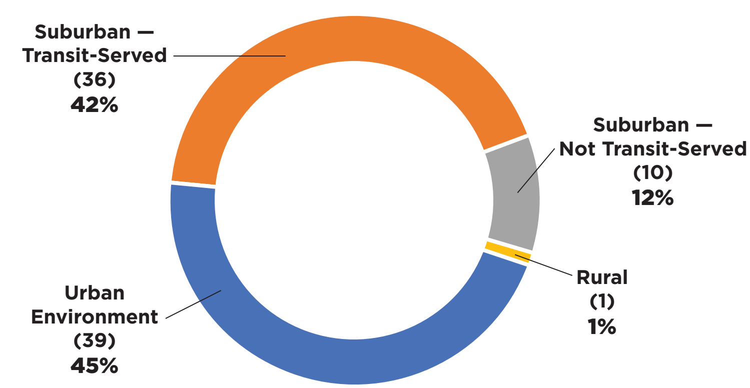
With 89% of respondents expecting to have a greater desire for more personal space, it is understandable that 29% are less likely to use public transit. The age profile of respondents suggests that this aversion to the use of public transit is more significant with those who are older. Of respondents aged 40 and over, 35% are less likely to use public transit, compared to 19% of respondents who are under 40 years of age. Given that many in our region do not own a car or have limited access to one, this potential change in attitude about the use of public transit might create financial challenges for those who cannot afford an additional vehicle.

Another way of looking at this shifting preference is that our region's sidewalks, trails, and bikeways will become even more important. Without a deeper understanding of whether respondents would prefer to choose personal vehicles, ride hailing, car sharing, transit, bikes, or walking, this topic is just one of many that will require further study.

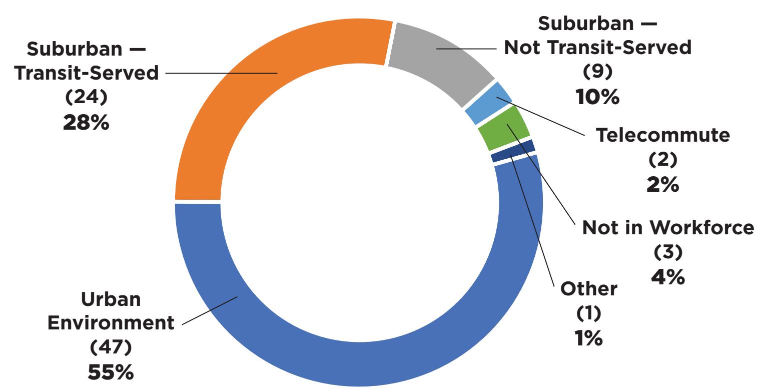
Conclusion

In conclusion, with 86 respondents, it is important that we acknowledge that this survey should primarily serve as an indicator of the preferences of a limited survey sample size from across our region. The following charts highlight the demographic profile of the survey respondents.

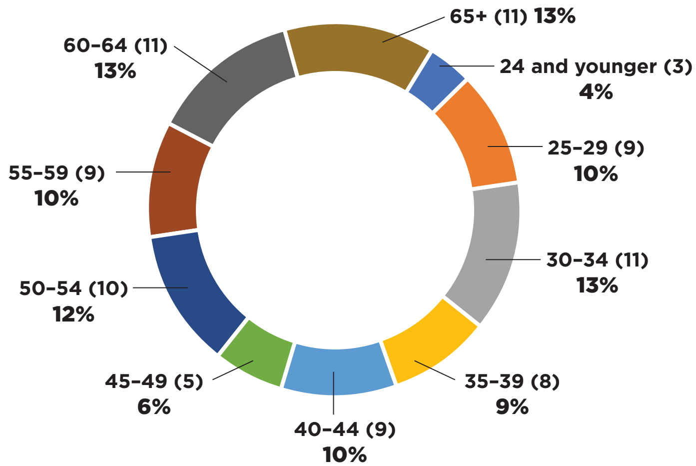
THE PLACE OF RESIDENCE OF RESPONDENTS



THE WORKPLACES OF RESPONDENTS



THE AGE OF SURVEY RESPONDENTS



Further study and a larger number of respondents is needed to form the basis of smart growth policies with a higher degree of certainty. We also need to keep in mind that the views of respondents are likely to evolve as this pandemic shifts from a months-long disruption to one that could impact our lives for one or more years. As our desire for personal space that helps us feel safe and healthy increases, we may see increased demand for residences with direct entry from the street, home offices and more usable terraces and outdoor spaces. And as our willingness to be in public places grows, there could be an unprecedented demand for wider sidewalks, open-air commercial districts and more connected trails, neighborhood civic spaces and regional parks. ■

ABOUT US

The Delaware Valley Smart Growth Alliance is the leading advocacy organization dedicated to making the case for Smart Growth in Southeastern Pennsylvania, Southern New Jersey, and Delaware.
It is a 501(c)(3) non-profit formed in 2005 to help:

- Educate the public and local governments about the benefits of Smart Growth
- Advocate that developers incorporate Smart Growth into development proposals
- Facilitate support for Smart Growth project proposals during the municipal review process

The survey was written by Jason Duckworth from Arcadia Land Company and Brian O'Leary from the Chester County Planning Commission and the survey analysis was prepared by Mark Evans and Michael Newman from Derck & Edson LLC – planning, architecture, landscape architecture & civil engineering.

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